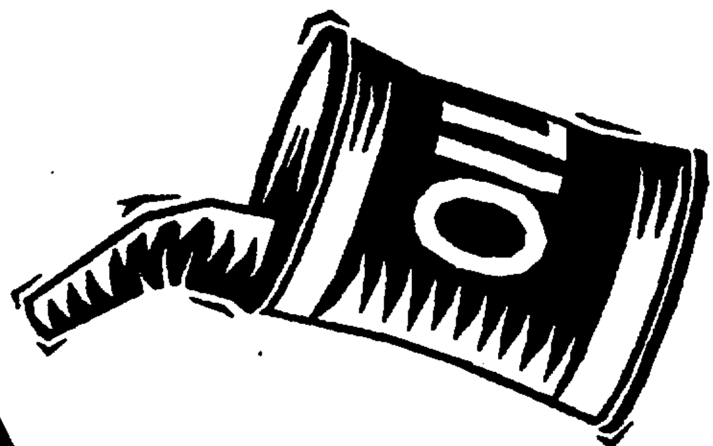
PROGRAM PLANNING WORKBOOK

TOOLS FOR SUCCESS



RECYCLE
USED OIL

PRESENTED BY:

CALIFORNIA INTEGRATED WASTE MANAGEMENT BOARD
LOCAL GOVERNMENT COMMISSION

SEPTEMBER/OCTOBER 1997

PROGRAM PLANNING WORKSHOP
TOOLS FOR SUCCESS

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INTRODUCTION - WHY SHOULD I DO THIS?

Planning is not a new concept to any of us. In our professional and personal lives we keep calendars and task lists and many of us use planner systems. So we already know that identifying the tasks we need to complete helps us achieve results. Building from this background, we can develop a plan to successfully implement our programs.

Each local used oil program is different from the next. While sharing innovative programs, information and tools can be very helpful, the most successful advertising campaign of one community may not be effective in another. The CIWMB wants to encourage all grant programs to share their ideas and their experiences, but before you decide to adopt someone else's approach we want you to be sure the approach fits the needs of your community.

The materials presented in this workbook focus on program planning with an emphasis on public education. Every element of your program from establishing and supporting recycling opportunities to developing and implementing public education campaigns can be developed under this system.

Planning is an on-going process. When faced with the challenge of responding to change, programs can be refined through evaluation and planning. The methods provided here have been designed to help you manage your program, and to assist you with reports, grant applications, and presentations.

STEP 1 - WHERE ARE WE NOW?

Before you launch into any effort, you need to have a foundation of knowledge about your jurisdiction, your resources, and your existing and potential partners. A clear summary of your community or region will help you determine program needs, identify audiences, and gather information helpful for grant applications. While developing this summary through brainstorming and a little research, you may highlight opportunities that were previously overlooked.

BACKGROUND INFORMATION AND COMMUNITY PROFILE

Identifying Existing Resources

This section in your workbook contains suggestions for organizing a variety of data including a physical description of your jurisdiction, population and demographic descriptions, and an evaluation of community character. You may find it helpful to customize or design your own categories.

A concise narrative description of your area can be used in grant applications and reports. Consider updating a profile of your community and maintaining an electronic copy that can be easily reused and updated. Brief statements of important facts are all you need.

Physical Description

The physical description will be combined with your descriptions of the people and character of your community to provide a complete portrait of your jurisdiction. This characterization will help those that don't live in or near your region understand the nature of your community. This information will also provide a starting point to consider the unique needs of your community and the opportunities you have to connect with the public. The information will raise issues you should consider for equipment, advertising and events planning.

Important things to consider are the size and shape of your jurisdiction. What defines the community boundaries? Does your community have any distinguishing features which the people of the community treasure and relate to? Does your jurisdiction has extreme weather conditions such as heavy rains, snow, or high heat? What waterways and water bodies are in your community or affect your community?

Another issue is to identify where your storm drains (if you have them) lead and how your local sewer system is designed. Since storm drains are a disposal route, people need to understand what they are impacting - local streams, lakes, or the ocean. Contact public works or planning departments for this information. Similarly, first hand knowledge of the impact of oil on your local water treatment facility can be helpful.

Things to consider

Physical size and features:

For example: Anytown covers nearly 600,000 acres, or
Bordered on the East by the Sierra Nevada's, or
Surrounded on three sides by National Forests, or
Situated in a valley 30 miles wide and 20 miles long

Special Features:

For example: Mountain Range, or
Hot Springs, or
Rivers, or
Beaches

Climate Considerations:

For example: Average Annual Snowfall 120", or
Summer temperatures average over 100 degrees, or
Spring flooding common in valley areas

Water Sources:

For example: Sacramento River runs through the Northwest corner, or
Borders Lake Merced, or
90% of the drinking water comes from underground sources, or
37 miles of Pacific coastline

Water Infrastructure:

Water System:

For example: The water treatment facility had to shut down 3 times last year due to damage caused by oil contamination.

Storm Drains:

For example: Five storm drains carry water to the river in the South and two carry water to a creek system in the Northern part of the County.

Note: Also consider sewage treatment systems and septic systems.

TIP: Places you can look for this information include:
Atlas
Government Agencies
Public Works Department
Fire Department

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A good physical description is a great way to begin your project narrative portion of grant applications.

People & Community

Understanding the people of your community will help you design a program that meets the needs of your community. Through planning you will identify which of these needs your program is ready to address. A clear assessment will also help you identify opportunities for innovative grassroot efforts and partners to extend your program reach. What you should develop is demographic information - helpful trends, characterizations, and descriptions - and not just data.

This section provides suggestions to help you describe the people in your community, as well as the characteristics that make your community special. What is the community known for? What are the residents proud of?

Planning note: These issues will be revisited many times throughout your planning process and as you identify new information. The key to all of this work is to get a good start. Accept that you will be adding and changing information as you go, and adjust your goals and objectives as needed.

Areas which you can develop:

➡ **Density** -

How many people live in your jurisdiction? How are they distributed?

➡ **Age Breakdown** -

Note patterns and areas which show age characteristics such as:

young family areas
college student housing regions
neighborhoods with older residents with few young children
retirement communities
extended family areas where many generations live in one household

➡ **Ethnicity** -

Be as specific as possible in your description of the mix of cultures which make up your community, Note specific enclaves. Note languages spoken; do the adults speak the native language primarily? do the children act as translators? It is important to identify any community groups or associations representing specific ethnic groups. Churches can be indicators of the ethnic groups within your community.

Examples of ethnic indicators include:

Russian Community Center
Asian Business Center
Hispanic Chamber of Commerce
Greek Orthodox Church
Vietnamese Grocery Store

➡ **Income Levels** -

It is also important to recognize the income levels of the people in your jurisdiction. Income levels are often an indicator of different needs and motivations.

Living quarters may indicate income levels. Housing types are generally mixed, but some areea may be distinguishable, such as:

military bases or housing
student housing areas
government subsidized housing programs
neighborhoods that are affluent
multi-family housing

Planning Note: Look for overlaps in the age, ethnicity and affluence patterns. They may indicate trends within cultural groups that may help you decide on strategies, messages, or distribution avenues.

TIP: For specific information in this area you can consult census data available in the reference section of your local library or on the Internet. Your local Chamber of Commerce, visitors bureau, or city/county governing agency might already have this summarized. Recognize that average numbers are probably less helpful for program design but may be helpful in grant writing or reporting.

➡ **What other information characterizes your jurisdiction?**

- Are there urban versus rural areas? What are the major industries or employers?
- Are there any motto's or mascots for which your community is known?
- Who are your community leaders?

- Schools: What schools and school districts serve your community? (The Dept. of Education publishes a California Public School Directory and a California Private School Directory each year. There is a fee for each.)

- Community Groups: What community groups are active in your area?

- Are there any historic features or qualities that the community is known for?

- What churches serve the community?

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Related questions which you will find in upcoming grant applications include:
What is the age breakdown of the population in your jurisdiction?
What is the ethnic breakdown of your jurisdiction (including languages spoken)?
What is the socio-economic breakdown of your jurisdiction (Income, education, etc.)?

PROGRAM ELEMENTS

Level of Service

You need to prepare a list of all existing collection opportunities for used oil and filters in your community. These include certified and non-certified collection centers, curbside programs, household hazardous waste events and facilities. Be sure to include filter collection sites. This listing will serve as a basis for site visits, and provides a central point for contact information. Your listings should include operator and contact information.

TIP: A Geographic Information System would be your best option if available. If not, start by obtaining a good map of your jurisdiction. Make a few letter or legal size copies for notes and highlights. Keep a clean master. The Internet has many map sites which can be helpful.

Existing Public Education Evaluation

If you have already implemented a public education campaign for used oil recycling, it is important to evaluate your past and current efforts. For example, have you previously used a theme or themes, a mascot, etc.?

Have you developed materials specifically designed for a targeted audience?

Are there other successful public information campaigns coperating in your community such as stormwater or household hazardous waste?

List the materials you have already developed, the audience they are intended to reach, the avenues through which they have been distributed, and the success or previously identified changes that you intend to make.

For example: Material - utility insert that lists curbside information
Audience - general public
How distributed - placed in water bills
Problems - did not reach multi-family residences
- not professional looking/eye-catching

PARTNERS

Programs that have the support of interested parties are more effective. You should identify these parties in your community and consider them your partners. Partners can include such a wide variety of organizations, businesses and agencies that you may find it helpful to categorize them. One system divides partners into three categories: program partners, media partners and outreach partners.

Program Partners

Program partners can include the collection center operators, haulers, other government agencies and nonprofit groups in your community that work on used oil.

Media Partners

Your work with the media will involve both paid advertising and news coverage efforts. The first step in your efforts of working with the media is to identify your local media sources and compile a media list. Media directories are the easiest way to gather names, phone numbers and addresses of media sources (television, radio, newspaper, magazine). Some helpful media directories are the *Metro Media of California* and *Bacon's Media Directories*.

TIP: While these media guides are comprehensive, they are also costly. If your media interaction isn't frequent enough to warrant this expense, there are other ways to gather the information:
Try local libraries, which often have copies
Contact other local grant recipients regarding their media contacts
Look in the phone book for general phone numbers and addresses

Outreach Partners

One of the largest areas that you can develop is a working assessment of outreach avenues and contacts in your area. These include museums, entertainment venues, parks and recreation program operators, car club representatives, and major public event coordinators.

Planning Note: Review these forms occasionally as you proceed through your strategic planning to bring creative ideas to mind.

SUMMARY

By gathering the information described in Step One, you have accomplished two major tasks:

✦ You have the information to procede with the planning process and identify the needs of your community.

✦ You also have developed a central list of resources available to support your program.

GOOD JOB!

STEP 2 - WHERE DO WE WANT TO BE?

Setting goals for your program is a critical step in the program planning process. It lays the foundation for your program and provides a point of reference for all future activities. As with your individual weekly, monthly or annual goals, it allows you to strive to expand and enhance your program. It allows you to build on your experience. It can help you realize areas of success, or provide insight to possible areas of innovation or improvement.

DEVELOPING GOALS & OBJECTIVES

Goals serve as a foundation for a strong program. We all have experience setting goals. By building on your individual experience and considering the following principles, you will be well equipped to design and implement your programs. In general:

- **Goals should be broad and realistic.** They should include specific references to your program and be able to be evaluated over the course of six-months or a year.

- **Take time and care when developing your goals.** Evaluate your past goals: were they realistic? did you make substantial progress toward reaching them? were they program specific? what can you do to create better goals? By taking time to think about your past successes, you can prepare more successfully for the future.

- **Spend time conducting research.** Many successful programs study the results of their past activities and conduct research on trends in their community. By spending time understanding the demographics of your community, and making your campaigns as audience specific as possible, you are more likely to create realistic goals.

- **Consider the major components of your program.** Create specific goals for each important element of your program. Are there components that are: being ignored? need funding in future years? are unrealistic? Seeing these goals, side-by-side will allow you to prioritize the major components of your program and their associated goals.

  In many cases, your goals will also need to be compatible with the goals and expectations of your jurisdiction's governing agency. Consider whether there will be any conflicts and try to create goals that will maximize the benefits to all players: the public, your agency and yourself.

Objectives serve as rungs on a ladder to help you reach your goals. They are specific, measurable and time-relevant. Objectives will also require research and careful thought about your program.

Objectives will keep you focused and on track. They serve as the incremental steps for each stage of your program. By reviewing them monthly you can track you progress and reassess the needs of your program.

Tasks serve as the action item to accomplish each objective. They are the most specific step in the planning process and are tangible, time-oriented items that will be accomplished by you or the project team. The more specific you can be, and the more details you can provide, the better. Subcontractors and administrative assistants will be more effective if they know what is expected for each task.

Grant Connection

Clear goals, objectives and tasks make it easier for the CIWMB to evaluate prospective grants. They will make it easier for you and your CIWMB grant manager to track the progress of your program. These goals, objectives and tasks will also be included on a work statement for grant applications.

TIP: When planning goals and objectives think holistically. Ask questions like:

- How can I improve collection?
- What areas/residents are not currently serviced? Is this a large percentage of the population?
- What barriers will I encounter?
- What innovative efforts can I adopt?

Assess Existing Goals and Objectives

Where are you now? Do you have a set of clear goals and objectives? Are they current? Do they need to be adjusted? Assessing your existing goals and objectives will help you prepare for all elements of your program.

Generate a List of New Goals

Brainstorm a list of possible goals that will help you reach your target audience and successfully implement your programs. Talk with others (your staff, CIWMB staff, other grantees and consultants) about how to increase the scope of your efforts and reach a larger audience. Write goals for each element of your program.

Refine Your Goals

Refine your goals by conducting research, ensuring that the major components of your program are addressed, and verifying that your goals are political feasibile and supported by your agency. You may choose to conduct research on specific elements of your community – many of these statistics and numbers will come from identifying the research you do in Step 1. Be sure that the major components of your program are addressed including administrative and fiscal activities.

Incorporate Evaluation in Goals and Objectives

Evaluation is a key element of any set of goals and objectives. With careful planning it is possible to measure whether the program was able to accomplish its goals and how well it achieved those goals. In general, evaluation begins with establishing a baseline.

Establishing a baseline of data that can be measured over time requires an investment of time and money. However, accurate baseline data will help you set realistic goals and achievable objectives and enable you to track your progress over time. The following steps will help you set a baseline:

1. Determine what data you want to collect.
2. Develop data sources.
3. Use both quantitative and qualitative data to be comprehensive.
4. Analyze the data.

Based on your program goals, identify what data will be most helpful in tracking progress toward that goal. You can use primary data sources including self-generated, program specific numbers (i.e., numbers from HHW events or local collection facilities). Surveys, focus groups or interviews with the public may also be useful.

Distinguish between output and outcome measures. For example, measure the amount of people that visit drop off centers rather than the number of brochures promoting the centers that are distributed. Over time, the number of people visiting centers will be more indicative of the impact of your efforts. Quantitative outcomes are quantity specific and help you set a benchmark that can be repeated in the future to chart your progress over time. Qualitative data will help you know your target audience better. It includes information on thoughts and feelings and can be collected interaction with your audience.

Once you have baseline data on your program efforts, take time to analyze it. It will provide insights to areas where your program could be strengthened. Make sure your measurements can be repeated.

TIP: When evaluating your program, be sure to be consistent over time. Track consistent items and display them in a consistent way. Santa Clara County for example administered the same survey to all their HHW participants for five consecutive years. This provided them with data that could display changes and trends over time, and tables they prepared could be easily interpreted.

STEP 3: HOW WILL WE GET THERE

At this point the emphasis of the workbook will shift from program planning as a whole to reaching specific publicity/education goals. However, targeted publicity/education may not be a goal of your program at this time. Through your initial program planning work, you may have discovered that you need more background research on your jurisdiction or need to establish additional collection infrastructure before you can begin a targeted publicity/education campaign. The general framework presented here can be used for planning other program efforts.

There have been many excellent general publicity/education campaigns undertaken for used oil and HHW. To supplement this work we want to encourage you to begin a more targeted approach to publicity and education. Many people will ignore messages that do not directly address their specific interests and concerns. With this in mind, it is important to deliver a message toan audience that needs to hear it, in a manner that will make them react and change their behavior for the long term.

IDENTIFY TARGET AUDIENCES

Have you ever been solicited on the phone or in the mall to offer your opinion on something? Have you ever filled out a survey that asks your age, income and what interests you have? These are some common methods businesses use to determine who their customers are and what motivates them. Businesses spend a substantial amount of resources on target audience identification. They can not afford NOT to! And neither can you. The methods used by businesses to indentify their target audience can be adopted for used oil recycling programs. This works well because, while we aren't selling widgets, we are 'selling' the message of proper management of used oil! It is a sound strategy to follow the business world's lead and devote a portion of our resources to target audience identification. It is well worth the investment.

Just who are we trying to reach with the oil recycling message? Naturally, it's folks who change their own oil (Do It Yourselfers or DIYers). But we need to take it a step further. We need to identify the DIYers that are illegally disposing of their used oil. Also, identification of the people who influence the DIYers is important! Who are these people in your community? How do you find out? This section should help give you some ideas on how to answer these questions and enable you to focus your energy and resources where they are needed most.

Things to Consider

There are a many ways to help you determine who you should be targeting with your publicity and education campaign. The Deen and Black research identified some preliminary information on who the DIYers are in California. A conclusion was that young Hispanic males are a likely target population. Also, the level of education and income have some bearing on who will change there own oil. While this sounds reasonable, it's not necessarily applicable in every jurisdiction. This is where the work you have done characterizing your jurisdiction will come into play. This background work will give you a feel for the socio-economic make up of your jurisdiction. This is a good place to start your search. Based on this information, you can begin to make assumptions about who your target audiences are. But don't stop there! You need to do some research to validate your assumptions. You might be surprised as to who actually turns out to be your target audience.

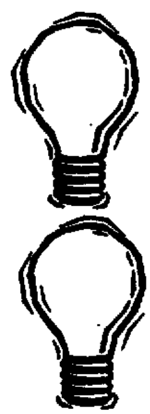
Listed below are a few ideas on how track down the elusive DIYer. Depending on the resources available to you, you may chose to adopt one or more of these methods. Mixing and matching these methods is also a good idea.

Market Research

If budgets allow, many local governments hire firms to help them with their search. These businesses will work with you to develop methods to identify the groups that need your attention. They use various methods including focus groups, phone solicitation, and 'man-on-the street' interviews to identify target audience groups and test outreach messages and methods. They are experts in designing questionnaires and focus groups dynamics so the results should be accurate and reliable. The fees for their services vary depending on the size and complexities of the population as well as the depth and breadth of the information you are trying to gather.

TIP: Many universities have research groups within their social sciencedepartments that do survey and focus group work. Check the schools in your are to see if you could work with them on your project.

TIP: If considering hiring a market research firm, examine the feasibility of partnering with neighboring jurisdictions with similar demographics. You could pool resources and split the costs of the research or expand the scope of the research to include other waste streams or other issues.



Go Where the Potential DIYers Are

This is often an inexpensive way to track down potential DIYers. If you have identified potential target audience groups through your community background work try to find out where these people are. Do they live, shop or work in the same area? Do they go to certain churches, attend particular cultural events, or frequent sporting events?

Good places to look for potential target audiences include:

- Church Organizations
- Community Centers
- Car Clubs
- Car Shows
- Neighborhood Organizations
- Adult Education Schools
- Sports Clubs (Soccer teams, softball, etc.)
- Swap Meets
- Sporting Events (Boxing, Car Racing, Soccer, Rodeos, etc.)
- Flea Markets

Go Where the DIYers Shop

DIYers must purchase new oil and filters for their vehicles. So going to where these items are sold is another sure fire (and inexpensive) way to find your target audience. Auto parts stores and variety stores (Target, Walmart, etc.) are great locations to find information on your target audiences. Be sure to ask permission of the store manager before you undertake any data gathering exercises. In fact, ask them for help with your research. Store managers are great sources of information. In many ways you share target audiences with the store manager. He wants to sell them the new stuff and you want to encourage the collection of the old stuff! What a great partnership! Ask him questions about the people who purchase oil from him. What ethnic groups do they represent? What age groups do they fall in? Do they ever ask about what to do with the old oil and filter?

TIP: Speaking with folks in the auto parts field is often a great way to gather "quick and dirty" information on the DIYers, however keep in mind the following:

- Customer traffic may vary widely between neighborhoods, so visit a number of parts stores in various locations throughout your jurisdiction to gather information.
- You will still have to do some background work on what motivates the DIYer; motivational factors vary widely between different socio-economic groups.

Go Where the Oil Should Not Be

Also consider investigating areas that have repeated incidents of illegal dumping. This is another way to try to track down the real target audiences. By visiting the area, you might be able to identify potential target groups and possible avenues through which to reach them. Identify who keeps track of illegal dumping (Public Works Department, Fire Department, Police Department, etc.) and review their records.

Your Own Backyard

How about asking around the workplace as to who are likely DIYers? There might be people in the office that may belong to groups that you have identified or know folks who are. Get in touch with other local governments that have similar demographics. Maybe they've done some work in this area and can give you some tips or share information. Call your grant manager and see if they know of similar work being done in your area. Also check with your local Chamber of Commerce or other business associations. These groups often have information on the population that can assist you in identifing target audinces. They keep track of demographic trends and other socio-economic information to keep the business community abreast of possible sales trends.

TIP: Looking around your workplace often yeilds some resources you might have overlooked. There might be folks that are bilingual who can help with interpretation of recycling messages or help you identify motivational factors for other ethnic groups. Maybe you've got a hard core DIYer that could help you with message development. At the very least, it is nice to have a fresh set of eyes to review publicity and education pieces.

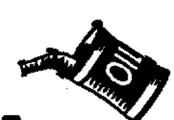
What Do I Do Once I Find Them?

ASK QUESTIONS! Once you've found a group that represents your possible target audience, say a church organization in your Vietnamese community or a low-rider car club in your Hispanic community make inroads to understand and communicate with them. Schedule meetings with local leaders, to explain your program and how it can be of mutual benefit. Reassure them that information provided will only help keep more used oil out of the environment. Begin to find out about the habits of their constituents. Do they change their own oil? How do they manage it? Are they aware of collection opportunities in the area? Are they aware of barriers to the proper management of used oil? Answers to questions like these will help you determine if the group is indeed a target audience.

By asking questions you will also be able to determine what type of target audiences you have. For example, some DIYers know that it is wrong to throw away their used oil and filter, but they are not aware of where to take it. These folks need education about collection opportunities. Other DIYers may have tried to take used oil to a collection center but the center was closed or they were turned away because the tank was full. These DIYers need education/publicity about alternative collection sites. Some DIYers have had trouble getting rid of their used oil because they've mixed it with antifreeze or brake cleaner. These folks need education about proper handling of all their automotive fluids.

Planning Note: When you have identified representatives from your target audiences or other people who have information on your target audiences, make a plan to keep in touch. These folks are valuable resources and keeping them informed of progress on your program will make them feel part of the solution. It will also facilitate further interaction when it is necessary for additional target audience work such as testing outreach methods and messages.

These are just a few ideas about target audience identification. You probably have some ideas of you own. We encourage you to try these methods in your jurisdiction. Any effort spent toward focusing your publicity and education efforts toward your target audiences will go far to help you develop and effective program.



PUBLICITY/EDUCATION TASKS

Tasks are always measurable and should be tied to a specific budget and time frame. As you develop tasks you will also want to develop a program calendar. There are many project organizer software packages that may be helpful as you plan your efforts. Tasks should tell you Who, Where, What, and be scheduled to show you When.

To develop your tasks, build from your goals and objectives and your target audience information. (Remember we are focusing on publicity/education efforts at this point in the workbook.) Your target audience information should reveal effective techniques and avenues to achieve each of your publicity/education objectives.

For Example:

> In doing your background research you discovered a large population of Cambodians in a suburb of your community. By speaking to a representative of the church that serves the community you discovered that it is very common for a large group to get together on a Saturday and do regular maintenance on their vehicles. He also mentioned that he was not sure what happened to the oil that was generated during these events. The representative suggested to you that your involvement with this event would be well received by the community. This information gathering yielded the following:

Goal:	Expand publicity/education campaign to target the two largest ethnic groups in the community
Objective:	Coordinate Cambodian Community Outreach
Tasks:	Coordinate with a representative from the Cambodian Church to plan "Auto Maintenace Clinic" - Spring 1998

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Tasks will correspond to the information needed in the work statement for grant applications.

OUTREACH ELEMENTS AND METHODS

Now that you have identified your target audiences, the next step in the Strategic Planning Process is to communicate these messages to your audiences. Your message can be conveyed via the media, special events, trade shows, sponsorships or school programs. This section provides information on different methods and materials you can use to reach your target audience and ultimately inform them of your program.

Information Access

Before you begin to promote your program, it is important to consider how your targeted audiences will access the information, how you will respond to requests for information, and how you will maintain a high level of service. With today's explosion of information technology, there are many methods of distributing information and reaching your target audience. Depending on your target audience, consider developing a local telephone hotline number or creating an Internet home page as ways to both handle inquiries and effectively distribute your information.

Things to Consider Before Investing in a Hotline or Home Page!

* Why should you create your own hotline or home page?

* Would it be more economical and practical to tie into an existing number/home page?

* Do you have the resources to handle inquiries?

* What is the purpose of implementing a hotline/home page?

TIP: The CIWMB has an agreement with Earth's Environmental Hotline - 1-800 CLEAN-UP to provide service for California. This is a 24 hour automated hotline which provides callers information on collection opportunities for used oil and filters. There is no cost to local governments to use this service, however all updates are handled by the CIWMB. Distribution of measurement and evaluation information is currently being researched.

Once you decide to implement a hotline number or a home page, or both, widely distributing the access number/address is vital. To do this, you can publicize the hotline number and web page on collateral materials, in your press kits, press releases, brochures, posters and advertisements

Hotline Numbers

Public access 800 numbers are easy and inexpensive to set up. Moreover, billing statements can be designed to provide valuable data. Reports can show where the calls are coming from, length of call, date and time of call, etc. This information can help show the effectiveness of your promotion and advertising efforts. To check on setting up your own hotline or 800 number, contact your local telephone service provider.

Home Pages

In today's information boom, developing an internet home page has become common in distributing information to a wide range of audiences. Depending on your targeted audience, a home page can also

provide an opportunity for valuable feedback from viewers. Web pages can also be linked or publicized on other home pages that have a vested interest in your program (such as the CIWMB's home page).

TIP: The CIWMB's Home Page can be found at http://www.ciwmb.ca.gov

Events

As you develop strategies, it is helpful to have a resource of ideas or options. You may wish to keep a brainstorm list of ideas for reference. You may also wish to keep a guide with information about different materials and methods.

This section provides information on different types of materials you may choose to publicize your used oil program, and identifies some of the different venues at which to distribute them. These materials are tangible objects such as posters, brochures, direct mail pieces and give aways designed to deliver and support your key messages and create awareness about your campaign. This section is intended to be revised and improved as you gain more information.

One of the most important things you can keep in mind is after you have identified your audiences is where can you find those audiences. If you can go to them you will be much more successful than trying to get them to come to you for information.

Community Events

Community events offer a great opportunity to provide information to an audience, and also give you a chance to interact one-on-one with the community. These events are a great place for informal surveys, feedback on your program, and testing of new messages and materials. Sponsorships are generally available which include booth space, signs and banners and press coverage before, during and after the event. Participation through booth displays and distribution of materials is a less expensive way to be involved in community events. If you are unable to attend, consider advertising and providing give-aways that can be handled by the event staff such as bags for the attendees or information with programs.

When participating in community or even sporting events, you might try to partner with an organization that has credibility with the audience. The CIWMB has partnered with auto parts retailers and oil manufacturers in promotions at sports events, to gain acceptance in the audience and to share resources.

Planning Note: When investigating community events and sporting events for participation, look back at you initial list of public education partners, you can continue to build this list as you identifynew avenues. Suggested events include:

flea markets, auto shows and rallies, cultural events, sports events of all kinds, sports stadiums and arenas, parks and recreation programs, and boat shows.

TIP: Create a master calendar of events. You may consider making notes of major community events even if you do not plan to participate, so that your event planning doesn't conflict with these events.

Speakers Bureau

Large and small communities have groups that need qualified speakers for weekly or monthly meetings. In your organization, you may have a number of people who can present interesting programs on their specialty. Before setting up speaking engagements with groups in your community, make sure the program is interesting, informative and professional. Make sure speakers are prepared to answer questions after their presentations.

To arrange a speaking engagement, first decide what issue you would like to address. As with press conferences, press releases, letters to the editor and other media relations techniques, it's important to have a focused message or theme.

Next, consider who would most benefit from the information. These might include local high-schools or church groups. To find other groups in the community, look through the local Yellow Pages; go to your local library and browse through the reference materials available from different groups in your neighborhood; look through the local newspaper's calendar section; or call your local Chamber of Commerce.

Schedule a Special Event

If there are no events available for you to attend, you might consider holding your own special event. Keep in mind that planning a special event will take considerable time and up-front coordination, but can be very valuable especially in small communities.

To gain interest in an event, the whole event must be based on a need or an interest of the community. "Oil Recycling Days" may not attract as much attention as "Family Safety Days." Solicit help from other agencies, businesses, and organizations, and be realistic about the return you will receive for the amount of effort any event will require.

A Few Common Principles of Special Events

* There must be a defined purpose.
* Detailed planning is essential.
* A comprehensive budget must be prepared.

* Someone must be in charge. Committees are often involved, but they cannot manage an event.
* Find partners to co-sponsor the event and mail promotional materials.

Tips for Developing Special Events and Community Events

Questions to Ask

Thinking strategically about your goals and purpose for developing a special event will be important to its success. The questions below are designed to help you with this process.

1. What exactly is supposed to happen and why?

2. How does the event help you achive your goals and objectives?

3. What is the key message you will be promoting?

4. Where is the event being held?

5. How will you publicize the event (television, radio, newspaper)?

6. Who can be your partners?

Tips for Making Your Event a Success

1. Plan well in advance.
2. Assess available resources. Budgeting and staffing.
3. Create a detailed timeline.
4. Create a task list to keep you on budget and on target.
5. Know your target audiences.
6. Bring in a second party to add credibility and expand resources, such as a Corporate sponsor. Depending on the theme, many corporations or businesses are willing to participate in worthwhile community causes.
7. Seek feedback on the events effectiveness. Once the event has concluded this information will prove invaluable in planning future campaigns.

Outreach Materials

There are hundreds of options to choose from when deciding what type of collateral material to produce. No matter what types of materials you choose, keep in mind these suggestions:

1. Choose a specific piece for the audience.
2. Get input from representatives of the audience. Share with them your ideas on what you are going to produce. Ask them for suggestions on moreeffective ways to convey the message.

3. Ask representatives of the audience to review a final draft for clarity and appeal.

Things to consider

1. Who will design the piece? Do you have the capabilities within your organization or do you need to contact a graphics company?

2. How many should you produce?

3. What is the total time it will take to get the material designed and printed?

TIP: Look for opportunities to add your message to items already received by your audience. Utility bill inserts and envelope imprints have been used effectively. Try to identify items that will be kept and referenced by your audience.

Listed below are some of the more commonly used options.

Brochures and Flyers

Brochures are used primarily to give a thorough explanation of one specific subject or program. They consist of double-sided printed pages, that may be bound together.

Flyers are usually a single piece of printed paper that delivers simple messages that do not involve much explanation. They are usually distributed at the point-of-purchase, where people buy oil, or as inserts into direct mail and other materials.

Things to consider when creating a brochure or flyer

Planning Guidelines:

1. Define a purpose and an audience.

2. Determine usage and life span. To help you determine size, format, and quantity, answer the questions below.

   A) Will the publication be carried in a pocket?

   B) Mailed in an envelope?

   C) Placed in an information rack?

D) Used as a self-mailer?

E) Distributed widely or only to VIP's?

F) Will the copy need frequent updating?

G) How long will it be used?

3. Position your subject. Determine what makes your message important to your audience.

4. Establish budget parameters. Early on, establish an approximate budget. It should include the cost of planning, design, writing, finished artwork, printing and mailing.

5. Create a realistic schedule. Printed items take more planning than a basic news release. A simple flyer may be produced in a matter of days, but a complicated brochure can take months.

6. Research other materials. A review of other printed materials will give you ideas about the size, look, or feel that you want for your brochure or flyer. This research should also give you ideas about type size, paper stock, illustrations, and color.

TIP: Writing brochures and flyers is a specific process. The objective is to inform, explain, instruct or persuade. You must have accurate facts and the material must be understandable. Local information and understandable facts that the audience can relate to are most effective.

Direct Mail Pieces

These are targeted letters or postcards sent to a specific audience containing key information, facts, and a clear call to action.

A direct mail piece contains 3 basic elements:
1) An introduction which tells the recipient why the letter is being sent
2) A body which gives the facts, often with strong emotional overtones
3) A summary or conclusion, which calls for some action

It's a good idea to enclose some additional information and always have something to help the reader respond, like an order form, return card or a telephone number.

Posters/Calendars

Posters are used in a variety of settings to create awareness and remind people of your program. To be effective, a poster must be attractively designed and have strong visual elements. It should be relatively large, convey only one basic idea and use only a few words to relate basic information. Posters can be quite expensive to design and produce. Poster contests have been used to further involve the audience in the project and to help create a message the audience will respond to.

Door Hangers

These convey simple benefits and facts. They can be distributed throughout neighborhoods to publicize local used oil collection centers or used in conjunction with an incentive campaign to offer coupons. Unique shapes and designs can be especially eye-catching and will help to keep these materials from being thrown away.

Give Aways (premium items)

Premium items, as they are commonly called, are things such as pens, notepads, magnets and other materials with key information printed on them. For example, you could print your local 800 phone number on a refrigerator magnet and distribute them at point-of-purchase locations in conjunction with a brochure or other materials. Another good idea would be to give away key chains in the shape of a boxing glove or soccerball to sports enthusiast at sporting events. Any items distributed should include a reminder to recycle motor oil and have a local or 800 phone number.

> **TIP:** Investigate items with recycled content and try to keep waste to a minimum when ordering any premium items.

Helpful Hints on Producing Materials

1. Volume decreases the unit price. Ask what the price breaking point is for your collateral piece. For example printing 500 brochures might cost $1.00 per brochure but printing 1000 might cost only $.70 per brochure.

2. Use only 2 or 3 different types of fonts.

3. Use only 2 or 3 different colors (two color is black/white). This keeps the collateral piece uniform and easy to read.

4. Request a mock-up for final approval.

5. Request the master disk of your materials for future use.

School Outreach

Children and teenagers are an increasingly important ally in promoting environmental responsibility to adults. Many schools have environmental awareness curricula which teach students the importance of recycling and protecting the environment.

Introducing your message into the school system can be effective, but there are many important issues to consider.

1. Are you sure school programs are a priority for your overall program?
2. Do not plan on bringing actual teaching materials into a classroom for a teacher to present without extensive development, planning, and approvals.
3. Presentations, contests, and distributing information are easier to accomplish but still require a great deal of up-front development, scheduling, and approvals.
4. Be very careful what materials you give to students.
5. Always involve teachers in planning any education project. District officials, education professionals and students an also be helpful.
6. Be flexible - no two schools or classrooms will be the same. Talk to each individual teacher. They will help you prepare and adapt.

Media Outreach

Effective media relations is essential to your organization's ability to achieve its objectives. This section describes methods you'll use to contact the media. No one method of contacting the media is the best, it all depends on the situation, the news worthiness of your material, and most importantly, the preferences of the editors and journalist you're working with. You will uncover these preferences as you build working relationships with your local media. This section contains suggestions for working with the media on news coverage, not paid advertising.

There are several methods and materials you can create to inform the media about your program or event. One of the pieces of information that you can create that can be used on an ongoing bases is a press kit.

Press Kits

Press kits should include information about your program, including: fact sheets, backgrounders, creative samples, photographs, feature stories and selected biographies and press releases. It is not always necessary, however, to include all of these pieces of information, depending on availability and the nature of your program.

All this information should be placed in a single folder. The folder can be a basic one- color folder or, depending on your budget, an elaborate one that includes designs and logos. You should always include a business card with a press kit.

Press kits are usually distributed after a press release has been sent and follow-up calls have been made to targeted media sources (please see the section on How to Write a Press Release). Once an editor or news director has received a press release or phone call, they will often need more information — a press kit.

Essential Elements of a Press Kit

Fact Sheet

* A fact sheet is a resource document to help reporters or editors check basic facts and convey accurate information.
* It summarizes the facts about a particular subject, whether it is an event, an organization, a product or a service.
* A fact sheet is like an instruction book for your program and shows how your program is put together, usually in a logical step-by-step manner.
* A fact sheet differs from a press release in that it contains more detailed information (a press release takes one area and concentrates on it).
* Limit the fact sheet to one page, if possible.
* Try to cover as many facts and as much relevant information as possible.
* Listing facts in a "bullet" format (like we have done here) is one of the most common formats used when creating a fact sheet.

Backgrounder

A backgrounder is a basic recap or summary of pertinent facts and information about an organization or program. It explains what led to a story or event, or how it all came about.

A backgrounder should be accurate, complete and objective. It is your responsibility to provide background information so reporters or editors understand your program well enough to write intelligently about it. A history of the program should be included, the reason it was created and an explanation of any technical terms or complicated information.

A backgrounder can be one paragraph or two pages, depending on the amount of information you want to include. One page, two to three paragraphs is a typical length.

Audio/Visual Materials

Visual materials, often referred to as info-graphics, include pictures, logos, charts, graphs and statistics. They are extremely useful when pitching a story to the media. Visuals grab a reader's attention and reinforce the message. Editors are often more receptive to a story pitch that has accompanying visuals than text alone.

It's up to you to decide what visual aids you would like to use. As long as you stay focused on your overall message, you can be as creative as you want.

TIP: Before sending anything out, it is best to contact the media outlet you are targeting to find out what format they would like you to use. When including photographs, make sure they are clean and sharp and that the image is clearly explained. It is best to send black and white photos to newspapers.

Other Media Materials

A few other common methods of communicating messages to the media are:

Pitch Letters - You can generate media interest by developing a topic or idea that would be interesting in the local news, putting it in a letter and distributing it to local media outlets. Your goal here is to get the editor or news assignment editor interested in your story and in gathering more information.

Press Releases - A standard method to communicate messages to the media, press releases allow you to enhance media coverage and influence the way an event will be portrayed in the media.

Media Advisories - A media advisory (or news advisory) informs the media in advance of when and where you are holding an event they would be interested in covering.

Pitch Letters

There are three goals to keep in mind when developing a pitch letter.

A) It should be one or two single-spaced pages.
B) It should have a good lead — an interesting sentence that catches the editor's attention.
C) It should always get to the point as soon as possible.

When pitching a story it is important to include the following 6 elements:

1) Enough facts to support a full story
2) An angle of interest to the readers of that specific publication
3) The possibility of alternative angles
4) An offer to supply or help secure all additional information needed or requested
5) An indication of authority or credibility
6) An offer to call the editor to get a decision

Before sending pitch letters out, call to confirm that you have the correct address, titles and spelling of the media contact's name.

Once you have distributed the letters, you should follow up with a phone call to the editor to make sure they received it and ask if they have any questions. This should be done about 5 days after the pitch letter was sent out.

Press Releases

Here are some suggestions to help you in writing a release:

* Use your letterhead and begin the document six to eight spaces from the top of the page. If you do not have any letterhead, you should create your own.

* Write FOR IMMEDIATE RELEASE in capital letters in the left hand margin with the date directly underneath.

* Write CONTACT: printed in capital letters with the name of the person at your organization who will be in charge of media relations. Place your organization's phone number underneath.

* The headline should be catchy and just long enough to grab journalists' attention. It should appear in capital letters, in bold print and centered on the page. Study headlines in your local newspaper for ideas.

* Present your information concisely. Press releases should be as short as possible and should never exceed two pages. On average, a press release is a page and a half, using double spaces. If a release is running long, you may have more than one story to tell and more than one press release to write.

* Limit yourself to one topic per release.

* Your first lead paragraph should clearly summarize the "who, what, when, and where" of your event, activity or announcement.

* The most important information should appear in the first paragraph, followed by less important information. This is called the "inverted pyramid" style.

* It is a good idea to begin the second paragraph can begin with a quotation backing up the information presented in the first paragraph. (Remember, the quotation marks go outside of the period or comma.)

* Paragraphs should be short. With rare exceptions, no paragraph should run longer than a third of a page. Try not to break paragraphs and never break sentences between pages.

* If the release is more than one page, add "more" at the bottom of the first page, then place a "slug" at the top of the second page. A slug is a short phrase or word describing the story.

* A final optional paragraph is called the "boilerplate," an old press term for prepared text to be used over and over again. This is information which contains the standard language used to describe your organization and program.

* End the release with three "pound" signs (###) centered at the end of your release, roughly four carriage returns below the last line to let the reporter know the release is finished.

* Check spelling and grammar carefully before sending anything out.

Media Advisories

Unlike a press release, a media advisory briefly announces an upcoming press conference or another specific event. They can be viewed as an invitation to the media. In a media advisory you should include the time, date and place of the event, the names of contacts at your organization and any other special information about the event.

A typical one page advisory contains the following elements: a headline, a brief paragraph outlining the event or story using a WHO, WHAT, WHEN, WHERE, WHY, and HOW format. Include this information at your own discretion. The advisory can be put on letterhead, but it is not a must. Remember to always include a contacts name and phone number.

Media Interaction

Perhaps the best way to get your message out to the community is by directly interacting with the media. After writing press releases or press advisories, you may want to try more direct methods, such as press conferences. Letters to the editor can also be beneficial.

Press Conferences

The two major reasons for having a news conference are to:

1. Give all media an opportunity to hear a particular announcement at the same time.

2. Provide a setting where reporters can ask follow-up questions.

You should only call a press conference when there is important and significant news to announce. Press conferences require detailed planning. The time of day, location, room setting, and presentation of information are important components. The following checklist contains essential steps and procedures you need to do before, during and after a press conference.

Press Conference Checklist

Before Conference

____ Decide on a message.

____ Select speakers, brief them on the presentation and rehearse. Appoint one person to be the principal spokesperson who will keep the news conference moving and "on message."

____ Select visuals, graphics and props that complement the speakers and the message.

____ Choose a location. Priority should be given to locations that provide a striking visual backdrop to your message.

____ Select a time and date.

____ Send press advisories and invitations to media, with information about the time, date, location, who will be speaking and a hint about what will be announced that is newsworthy.

____ Prepare press releases, a fact sheet, photos, or other back-up material that will be helpful to reporters.

____ Anticipate what questions may be asked of the speakers. Run the speakers through a practice question/answer session.

____ Follow up with phone calls to remind media contacts of the conference.

During Conference

____ Hand out media kits with press releases and any relevant information that will be covered during the conference.

____ Make an audio or video tape of the press conference.

____ Take photos that can be sent out to media contacts after the conference.

____ At the end of the conference, staff should make sure that reporters have received all the information they need. If reporters need more information or a back-up source, get names and phone numbers so that staff can call later with the information.

After Conference

____ Send out a press release to the media outlets that weren't able to attend the conference.

____ Call those reporters that needed additional information and provide them with the information.

____ Follow up with thank you letters to attendees.

Letters to the Editor

Letters to the Editor can be an effective means of communicating with the public. You can say things in a signed letter that might not be printed in a news or feature article.

You can also gently correct a misimpression left by a news story. However, be careful not to alienate the reporter or publication. Instead, find something to agree with in the article before you correct the mistake. You may also want to praise the newspaper for reporting the story, then add more details about your program later in the letter.

There is limited space for letters, so you should closely follow any guidelines that the publication has established. You can find out about these guidelines by contacting the paper and asking for them ahead of time. It is very important to keep letters short and to the point. In general, letters should be under 250 words.

Letters to the editor follow a basic format:

1) The opening paragraph should identify the subject of the letter.
2) The second paragraph states your position on the subject.
3) The following one or two paragraphs develop your argument, using facts and other pieces of information.
4) A final paragraph should include information about the company or product that relates to the subject being discussed. You should sign the letter, giving your title and company or organization.

Tips on Working with the Media

1. Get the reporter's attention. Remember, you are only one of perhaps dozens of people trying to reach the reporter that day. Be polite. First, make sure he or she has a moment to talk, otherwise your pitch will fall upon deaf ears.

2. Sell the story. Have a list of possible story angles, "hooks," in mind before calling. Be specific about why you feel they would be interested in your story.

3. It's okay if you don't have all the answers. If you don't know the answers to questions, tell reporters you will call them back with the information they are looking for, and remember to call them back. Being a dependable source is critical to developing positive relationships with media.

4. Get a commitment for the next step. Try to get the reporter to come in and see for themselves how your organization is helping the community.

5. Take notes.

6. Get your own clips.

7. Most importantly — nurture your contact. When the reporter does write your story, send a personal note from your organization after the story comes out. If for some reason you are not satisfied with the story, write a polite letter detailing the incorrect information and ask that any necessary corrections be printed.

STEP 4 – HOW ARE WE DOING?

AN INTRODUCTION TO EVALUATION

We conduct evaluations to measure the success and impact of our programs. It can illustrate how effective we are at encouraging people to participate in our programs and how effective we are at promoting the recycling of used motor oil. The ultimate goal of evaluation is to qualitatively and quantitatively track the progress of a program.

Unlike corporations, we have no convenient units of measurement (i.e., units sold, shipped or profits made). We are involved in the social science theory realm of behavior change. However, there are still practices that are quantifiable and statistics that will help us track the progress of our programs.

Specific recommendations for ways to evaluate your programs are currently being developed. Until this information is compiled in a single workshop, you can build on the experience of other programs throughout the state. Numerous programs like those of Santa Clara County, Los Angeles County, Orange County and others have implemented effective evaluation programs. In general they have included the following elements:

- performance standards that are tangible, logical and understandable;
- data and tracking systems that build on existing efforts; and
- consistent use and collection of data.

Some of the places these programs have collected data include: HHW events, drop-off centers, and supermarkets. They have conducted telephone surveys, mail surveys and focus groups.

Ask yourself what you can do to begin to evaluate your program. In general, you should:

1. **Establish a Baseline**. As described in Step 2, establish a baseline of data and information to measure your progress over time. Determine what data you want to collect, tie it to your goals and objectives, and begin collecting data.

2. **Remeasure**. Collect data as consistently as possible. This will allow you to remeasure and compare your numbers against your baseline.

3. **Evaluate the Results**. Look for trends and changes in your data. Is there an increase or decrease in participation. Can you explain these trends?

4. **Modify Program**. Based on your results, modify your program to further effect the desired change.

Grant Connection

An evaluation component helps demonstrate your desire to refine and improve your program. It provides insight on how your program is doing over time, including what is needed to make your program more interesting to your target audience. It can help you refine your program making it easier to decide what are the most important elements of your program.